



Donor Advised Fund Establishment Questionnaire & Information Form

The St. Croix Foundation will use your responses to the following questions to establish a custom-made fund that is designed to suit your organization's mission and vision with regard to its charitable giving.

1. What funding priorities does your organization have?

- Education
- Community revitalization: historic preservation, island clean-up, etc.
- Public Safety
- Other: _____
- Other: _____

2. All grants awarded must be made in support of programs or causes which are charitable in nature. What type of grant program(s) would you like to support?

- Programmatic support grants
- Individual scholarships
- Both

3. Funds can be set up in a variety of ways to include grants and scholarships, with a comprehensive application process and formal grant cycles that are designed to respond to identified community needs. For greater flexibility, the Foundation can also establish smaller, less formal grant opportunities that can respond to "emergency" needs for students or established programs (i.e. a student who is in dire need of money for books, or a program which unable to fulfill its mandate due to a delay or gaps in funding.)

What type of grants would you like to support?

- Standard grants or scholarships
- Emergency, "Seize the Moment," grants
- Both

4. All grants are reviewed by the Grant Review Committee. How many grant cycles would you like per year?

- One (standard Fall Cycle, which opens in September and closes in October)
- Two (standard Fall & Spring Cycle, which opens in March 15 and closes in May 1)
- A running cycle that accepts applications throughout the year
- Other: _____

5. What type of funding are you interested in providing to organizational programs?

- Seed money for start up programs
- Funding for continuation/expansion of an existing program with proven results
- Sponsorship funds for nonprofit fundraisers (fundraisers can be either to support specific programs or operational costs of an organization)

6. What is the maximum amount you would like to make available for:

- a. Programmatic grants: \$_____ (Recommended: \$2,500)
- b. Individual scholarships: \$_____ (Recommended: \$2,000)
- c. Other: _____

7. For long-term community impact, SCF recommends a consistent level of funding on an on-going basis. What is the projected, annual contribution for this Fund? \$_____

Together We Can Make a Difference!